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Chief Executive Officer

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First District

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Second District

ZEV YAROSLAVSKY
Third District

DON KNABE
Fourth District

MICHAEL D. ANTONOVICH
Fifth District

March 4, 2008

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, CA 90012

Dear Supervisors:

DEPARTMENT OF PUBLIC SOCIAL SERVICES: RECOMMENDATION TO AUTHORIZE THE CHIEF INFORMATION OFFICER TO EXECUTE A WORK ORDER WITH MICROSOFT CORPORATION FOR MICROSOFT EXCHANGE 2007 MIGRATION CONSULTING SERVICES (ALL DISTRICTS) (3 VOTES)

CIO RECOMMENDATION : APPROVE (X) APPROVE WITH MODIFICATION ( ) DISAPPROVE ( )

IT IS RECOMMENDED THAT YOUR BOARD:

Approve and direct the Chief Information Office (CIO) at the request of the Department of Public Social Services (DPSS) to execute a Work Order for consulting services under the County's Master Services Agreement (MSA) with Microsoft, for implementation of our Microsoft (MS) Exchange 2007 Email conversion for an amount not to exceed $257,250. This is in accordance with your Board's direction, which limits the delegated authority to the CIO to execute a Work Order not to exceed $100,000.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

The recommended action will allow DPSS to utilize MS consulting services to convert DPSS' current Lotus Notes platform to MS Exchange 2007 in order to standardize the Departmental messaging platform.

MS consulting services specified in this Work Order will include, but is not limited to the following:

- Plan, design, implement and test a scalable new enterprise MS Exchange 2007 Email platform that will ultimately support Email for the entire Department
- Successfully migrate approximately 300 current Lotus Notes Email users over to Exchange 2007
- Setup, configure and deploy web-based Email access for LEADER users, who currently do not have Email access (pilot for approximately 30 users)
- Conduct hands-on technical training and produce the documentation and deliverables needed to provide sufficient knowledge transfer to DPSS IT staff, so they can successfully take over support of the project

The project is expected to span approximately 19 business weeks, where a business week is defined as five (5) eight hour working days.

Implementation of Strategic Plan Goals

The recommended action is consistent with the principles of the Countywide Strategic Plan Goal #1: Service Excellence (Strategy 2), to implement programs to improve the efficiency, quality, and responsiveness of County services to all residents; Goal #3: Organizational Effectiveness, to ensure that service delivery systems are efficient, effective, and goal-oriented.

BACKGROUND

Currently, 4500 DPSS employees have been utilizing the Lotus Notes system via LANet for Email, bulletins, calendars, work assignments, and some customized database applications. For several years now, the Department has struggled to recruit and retain IT personnel with Lotus Notes skills and experience, and therefore have relied extensively on contractors to support the existing Lotus Notes platform. Lotus Notes systems maintenance costs have continued to rise due to increasing licensing, hardware and consulting costs. As a result, Lotus Notes is no longer seen as a strategic technology for DPSS, and is in fact inhibiting the Department from achieving its strategic business goal to provide more effective and efficient services to the public.

Therefore, in order to assist DPSS in achieving its strategic business goals, and to align the Department with Los Angeles County's preferred Email platform, DPSS plans to migrate its personnel from Lotus Notes to the MS Exchange.

Besides a reduction in Email system maintenance costs, MS Exchange Server 2007 will also offer DPSS improved functionality, such as:

- User friendly MS Exchange/Outlook Web Access interface
- Robust support for County information security standards
- Advanced search capabilities and support for web services
- Flexible management and administrative features
- Advanced Email filtering options
- Increased integration with web applications

FISCAL IMPACT/FINANCING

The total maximum cost for the Work Orders will not exceed $257,250. These funds will be expended in Fiscal Year (FY) 2007-08. Since there is a CalWORKs and Food Stamps Maintenance of Effort requirement, which will be met by the County, there is no additional net County costs (NCC) for these programs. The share of cost associated with programs such as General Relief results in an estimated NCC of $23,000.

Sufficient funding is included in the Department's FY 2007-08 Budget. The administrative provisions of the Master Services Agreement require confirmation that funding is available before the individual Work Order is executed.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

Microsoft is the manufacturer of the MS Exchange Email platform and is uniquely positioned to provide the required technical expertise, support and consulting services needed to successfully plan, design and implement an enterprise Email platform that meets the diverse needs of DPSS. Under your Board's direction, the CIO's delegated authority to execute Microsoft Masters Services Agreement work orders is limited to $100,000.

IMPACT ON CURRENT SERVICES

Email Migration from Lotus Notes to MS Exchange 2007 will provide the following benefits:

- Reduce the overall system maintenance costs associated with Email for DPSS and improve the Department's ability to support its Email platform
- Bring the Department's Email platform into alignment with Los Angeles County's preferred Email platform
- Provide Email access to all DPSS staff in order to enhance Departmental communications

- Utilize web-client Email access for LEADER workstations with limited memory and processing power that currently cannot support full-client access to Email
- Enhanced Email performance and scalability

CONCLUSION

Upon approval, the Executive Officer, Board of Supervisors, is requested to return two adopted stamped Board letters to the Director of DPSS.

Respectfully submitted,

WILLIAM T FUJIOKA
Chief Executive Officer

Reviewed by:

Jon W. Fullinwider
Chief Information Officer

WTF:SRH:MS
GP:JB:ap

Attachments

c: County Counsel
Department of Public Social Services

CIO ANALYSIS

MICROSOFT CONSULTING SERVICES FOR E-MAIL MIGRATION PROJECT

CIO RECOMMENDATION: ☒ APPROVE ☐ APPROVE WITH MODIFICATION ☐ DISAPPROVE

Contract Type:
☒ New Contract ☐ Contract Amendment ☐ Contract Extension
☐ Sole Source Contract ☐ Hardware Acquisition ☐ Other

New/Revised Contract Term: Base Term: 6 Months # of Option Yrs 0

Contract Components:
☐ Software ☐ Hardware ☐ Telecommunications
☒ Professional Services

Project Executive Sponsor: Michael Sylvester, IT Director, DPSS

Budget Information:

Y-T-D Contract Expenditures	$0
Requested Contract Amount	$257,250
Aggregate Contract Amount	$257,250

Project Background:

Yes	No	Question
☐	☒	Is this project legislatively mandated?
☒	☐	Is this project subvented? If yes, what percentage is offset? The e-mail migration project will be offset 96%.
☐	☒	Is this project/application applicable to (shared use or interfaced) other departments? If yes, name the other department(s) involved.

Strategic Alignment:

Yes	No	Question
☒	☐	Is this project in alignment with the County of Los Angeles Strategic Plan?
☒	☐	Is this project consistent with the currently approved Department Business Automation Plan?
☒	☐	Does the project's technology solution comply with County of Los Angeles IT Directions Document?
☒	☐	Does the project technology solution comply with preferred County of Los Angeles IT Standards?
☒	☐	This contract and/or project and its milestone deliverables must be entered into the Information Technology Tracking System (ITTS).

Project/Contract Description:

The Department of Public Social Services (DPSS) is seeking your Board's authorization for the Chief Information Officer (CIO) to execute a Work Order (WO) for consulting services under the County's Master Services Agreement with Microsoft Corporation (Microsoft) for a total maximum cost of $257,250. The WO will assist DPSS in migrating from the Department's Lotus Notes platform to Microsoft Exchange 2007.

The e-mail platform migration project is included in the Department's FY 2007-2008 Budget and FY 2007-2008 Business Automation Plans. Funding for all but $23,000 of the $257,250 will be offset using the Department's funds originating from the State of California.

Background:

The Department's 4,500 DPSS employees use a Lotus Notes System for e-mails, bulletins, calendars, work assignments, and some customized database applications. The Lotus Notes System is expensive for the Department to maintain because of licensing, hardware, administrative, and consulting costs. In addition, the Lotus Notes System is not aligned with the County's preferred e-mail platform.

The e-mail migration project will utilize Microsoft consulting services to support the migration of DPSS' current Lotus Notes platform to Microsoft Exchange 2007. Microsoft services include the following:

- Design and planning for the e-mail migration project.
- Develop and stabilize Microsoft Exchange 2007 in a lab environment to test the e-mail solution prior to execution.
- Deploy Microsoft Exchange 2007 in production and migrate 300 users with e-mail data from Lotus Notes Domino Server to Microsoft Exchange 2007.
- Pilot the migration of 30 users from Lotus Notes to the Microsoft Exchange 2007 environment
- Utilize Microsoft Exchange 2007 migration tools to migrate 270 users during the next phase.
- Provide hands-on technical training and associated documentation (Function Design Specification, Migration Plan, Coexistence Plan, and Test Plan Checklist documents) to DPSS to support their migration of the remaining Department users to Microsoft Exchange 2007.

Project Justification/Benefits:

The migration to Microsoft Exchange 2007 enables DPSS to expand e-mail access cost effectively to all DPSS staff to enhance departmental communication. It allows DPSS to reduce its administrative overhead and hardware costs, access improved functionality offered through Microsoft software (i.e., better filtering options, improved search and support for Web services), and align with LA County's preferred e-mail platform.

Project Metrics:

The e-mail platform migration project is divided into phases. Key deliverables include:

- Initial pilot of 30 users.
- Migration of the second group of 270 users to test the migration procedures.
- Department migration of the remaining 4,200 users.

Impact On Service Delivery Or Department Operations, If Proposal Is Not Approved:

The Department will continue to incur higher costs through Lotus Notes licensing, hardware, administrative, and consulting costs as well as not having access to the following County enterprise features:

1. Unified, web-based and mobile messaging for delivering and accessing e-mails, faxes, voice mails and calendars from Outlook, web browsers or mobile devices.
2. Continuous local and active/passive clustered data replication capability with automated fail-over to the passive server node for business continuity.
3. Policy engine with predefined transport rules for enforcing regulatory compliance on internal or outbound e-mails, voice mails, and faxes.
4. Integrated scanning capabilities with built-in Spam Confidence Level, Intelligent Message Filter, and Multipurpose Internet Mail Extensions defense against spam and "phishing" e-mails.
5. Encrypted messages for confidentiality using Transport Layer Security for server-to-server traffic, Remote Procedure Call for Outlook connections, and Secure Socket Layers for client access traffic.

Alternatives Considered:

No other alternatives were considered. The County's preferred e-mail platform is Microsoft Exchange 2007.

Project Risks:

The e-mail migration project has the normal risks for any migration project. The Department has mitigated these risks by providing executive sponsorship, stable project staffing, clear roles and responsibilities, project plan, and defined deliverables.

Risk Mitigation Measures:

The e-mail migration project has defined fixed price deliverables with assigned payments. Microsoft is the manufacturer of Microsoft Exchange 2007 and has the expertise to support the migration from the Lotus Notes platform to the Microsoft Exchange 2007 platform.

Financial Analysis:

Microsoft's cost of $257,750 for the e-mail platform migration project is the lowest of the vendor quotations received by the Department.

CIO Concerns:

None.

CIO Recommendations:

The Department is moving into alignment with the County's preferred e-mail platform, Microsoft Exchange 2007, bringing the County closer to attaining an enterprise e-mail system. My Office supports this action and recommends approval by the Board.

CIO APPROVAL

Date Received: 1/22/2008

Prepared by: James Hall

Date: 1/28/2008

Approved: Chris Modlin

Date: 2/19/2008

P:\Drafts\CIO ANALYSIS-Microsoft E-mail Migration Project.doc

Services Statement of Work

Exchange 2007 Migration

Prepared for

Los Angeles – Department of Public Social Services

Wednesday, 30 January 2008

Version .4

Prepared by

Waleed Nammari

Services Program Manager

Waleedn@microsoft.com

Revision and Signoff Sheet

Change Record

Date	Author	Version	Change reference
10/24/07	Waleed Nammari	.1	
11/21/07	Waleed Nammari	.2	Update based on customer feedback
12/04/07	Waleed Nammari	.3	Internal SQA input and feedback

Reviewers

Name	Version approved	Position	Date
John Ballinger	Ver. .2	SQA Manager	11/29.07

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INTRODUCTION

This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it is made pursuant to the work order No. (Work Order to Be Attached at a Later Date),, dated (Work Order Date TBD), the terms of which are incorporated herein by reference, by and between the Los Angeles County - Department of Public Social Services(DPSS) ("Customer", "you", "your", "LA-DPSS") and Microsoft Corporation ("Microsoft", "us", "we", "our"), or our affiliate, and sets forth the services to be performed by us related to the **Planning, Development, Stabilization and Deployment Phases** for the customer's Implementation of Exchange 2007 ("project"). This SOW, together with the work order, represents the complete baseline for scope, services, service deliverables, and acceptance applicable to this project. All changes to this document will be managed in accordance with the Change Management Process defined below. Any terms not otherwise defined herein will assume the meanings set forth in the work order.

Unless the customer signs the associated Work Order, this SOW and the associated Work Order expire on March 30, 2008 unless they have been formally extended in writing by Microsoft Corporation.

1 BACKGROUND

The Los Angeles County Department of Public Social Services, also known as (LA-DPSS) is planning to migrate from their current Lotus Notes platform to Microsoft Exchange 2007. This move is considered to be part of their strategic move to standardize on a messaging platform.

Here is a summary on their environment background

- There are approximately 4500 users who are on Lotus Notes today which will be migrated to Exchange 2007. In addition to the 4500 users, there are 8,000 users who are part of the "LEADER Group" who have specific Exchange requirements and needs which will be added to the Exchange Environment as new users. These users must only access Exchange via browser using the Outlook Web Access (OWA) platform. Furthermore, DPSS has another 4,000 users who do not currently have e-mail and will enventually be added to the Exchange 2007 platform. This brings a total of 14,400 users that the design must support.
- The current size of the database is approximately 2-3 TB in size. There are some applications that are running on Lotus Notes Domino but these most likely to migrate to other platforms and out of the scope of this engagement. Blackberry is being used by some users for accessing their e-mail remotely.
- Today there is a Windows 2003 Active Directory which is setup in Mix Mode, and consists of a Single Forest and a Single Domain. Windows DNS is also being used by DPSS. There is also another Active Directory domain specifically setup for the "LEADER Group" which also has a Lotus Notes Site that they belong to. The purpose of this AD domain is to allow the LEADER group to communicate, collaborate and to disseminate information amongst themselves. This AD domain will not changed nor be part of this project.
- On the desktop side at the LEADER network there are approximately 11,000 users who are still on Windows NT 4.0 workstations and this has been administered by a separate network group and managed by Unisys.

Their Business and technical requirements for migrating to Exchange 2007 are;

Business Requirements:

- The move to Exchange 2007 is considered to be a strategic decision by DPSS management
- To standardize on one County Standard e-mail platform
- To provide e-mail access to all DPSS staff
- Use Outlook Web Access "OWA" on browser-based machines, a specific requirement for the "LEADER Group"

Technical Requirements:

- Establish a functional Exchange e-mail service platform for the department
- Establish OWA e-mail access for browser-based machines
- Establish a server-based connector service between the former Notes E-mail service and the new Exchange 2007 e-mail service to afford the use of both platforms for the duration of the migration.
- Fault Tolerance & Load Balancing Solutions
- Interoperability with the department's new archiving and back-up services for the new Exchange 2007 E-mail service
- Interested in Disaster Recovery Solutions

- Recommendations for three-site geo-clustering design intended to provide the maximum high-availability services to support the current 14,400 user population for the department.
- Integration and collaboration with other applications that supports Windows platform

2 PROJECT OBJECTIVES AND SCOPE

2.1 Objectives

The objective of this Project is to migrate from Lotus Notes to Exchange 2007.

2.2 Areas Within Scope

The scope of this project and engagement will concentrate on the following areas:

- The following products are in scope for this project: Exchange Server 2007, Windows Server 2003 R2, and Active Directory, Client Access (CAS) server and Outlook 2007
- Planning and Design of Exchange 2007
- Development and Stabilization of the Exchange 2007 Solution in a lab environment which will require testing the solution before execution
- Deploying Exchange 2007 in production, adding 30 new users to Exchange and migrating approximately 270 users with mail data from Lotus Notes Domino Server to Exchange 2007
- Adding 30 new users to Exchange and ensure operability via OWA.
- Migrate 270 additional users from Lotus Notes to Exchange Microsoft migration tools will be utilized during the deployment phase
- Informal knowledge transfer is defined as the customer staff working alongside Microsoft consultant.
- The following documents will be provided to LA_DPSS as part of the project
    - Function Design Spec Document
    - Migration Plan
    - Coexistence Plan
    - Test Plan Checklist
- Environments setup and responsibility will be as follows;

Environment	Location	Responsibility	To be Ready
(Lab) – Development Phase	**LA_DPSS**	**Microsoft** Develop a Test plan Checklist Exchange setup and configuration Setup connectors and Migration Tools	**Lab – Development Phase**
(Lab) – Development Phase	**LA_DPSS**	**LA_DPSS Staff** Develop User Acceptance Plan	**Lab – Development Phase**

		Lab preparations. i.e. network, router access, hardware availability Setup & Configure Exchange Hardware	
(Lab) – Stabilize Phase	**LA_DPSS**	**Microsoft** Testing user/data migration, connector servers for coexistence, migration tools	**Lab – Stabilize Phase**
(Production) – Deployment Phase	**LA_DPSS**	**LA_DPSS** Configure SAN for Exchange Configure Production servers hardware, Setup Server OS	**2 weeks within Production - (deployment phase)**
(Production) – Deployment Phase	**LA_DPSS**	**Microsoft** Setup & Configure Exchange Servers Configure Connectors & Migration Tools	**Production – (deployment phase)** **2 weeks before user migration starts**

2.3 Areas Out of Scope

- Acquisition and recommendation of hardware and or software
- Non-infrastructure consulting services
- Windows Operating System Active Directory.
- Configuration of network devices such as firewalls and routers
- Configuration or installation of any third party software
- Configuration or support of storage area network
- Installation or configuration of hardware vendor within the production environment
- Testing of Third (3rd) party tools selection
- Encrypted e-mail – current Microsoft tools does not support it, will require 3rd party tools such as Quest
- Mail enabled applications
- Lotus Notes (Domino) applications
- Local Address books and Archives

Anything not in this section and not listed in the above "Areas within Scope" is considered out of scope for this SOW.

3 PROJECT APPROACH, TIMELINE AND SERVICE DELIVERABLES

3.1 Approach

One of the key goals of this project is to provide knowledge transfer to the customer staff and deploy Exchange following Microsoft prescriptive guidance. The Microsoft Consultant will work with the customer staff and Microsoft Program Manager to plan, design and deploy Microsoft Exchange Server 2007.

The Microsoft Consultant will follow the standard Microsoft Solutions Framework (MSF) methodology as described in the next section

3.1.1 Microsoft Solutions Framework

We will leverage the Microsoft Solutions Framework (MSF) to execute this SOW. MSF represents a proven solution development approach that provides for well-defined phases that take into account development of requirements, architectural design, detailed software design, software development, system testing, and managed release cycles.

MSF organizes the solution approach into five distinct phases during the project lifecycle. These phases are as follows; Envisioning Phase, Planning Phase, Development Phase, Stabilization Phase and the Deployment Phase.

- **Envisioning Phase:** Envisioning involves creating a business vision and defining the scope of work necessary to bring the vision to reality. The Envisioning Phase is currently in progress and will be completed prior to the start of this engagement. **(Out of Scope)**

- **Planning Phase**: Planning continues through the development of detailed functional specifications, Exchange 2007 architecture, and a detailed Project plan for the remainder of the Project.
  Key activities for this phase are as follows;

  a. **Key Microsoft Activities**
     - Review Vision Scope Document
     - Review Risk Assessment Log
     - Conduct three days of Design workshops/sessions
     - Create a Functional Design Spec document
     - Create a Migration Plan
     - Create a Coexistence Plan
     - Modify and update documents

  b. **Key Customer Activities**
     - Be available at all time to timely receive and provide information to the Microsoft team about inquiries and issues
     - Be available at all time to work side-by-side with the Microsoft team
     - Be available to review documents and provide feedback to Microsoft.
     - The customer project team should be available for weekly status meetings with the Microsoft team as scheduled.

c. **Deliverables**

- Functional Design Spec document
- Migration Plan
- Coexistence Plan

- **Development**: The Development phase is a lab environment where a test plan checklist will be developed and the test lab will be setup in preparation for testing the Exchange Solution.
  Steps that will be executed on are;

  Key activities for this phase are as follows;

  d. **Key Microsoft Activities**
  - Create a Test Plan checklist
  - Configure the Exchange Servers (Mailbox, OWA, Edge Servers, etc.) and the necessary tools for migration, interoperability in the lab/Development environment

  e. **Key Customer Activities**
  - LA_DPSS Staff to develop a User Acceptance Test Plan
  - LA_DPSS Staff will be setting up and configuring the Server hardware in the lab/Development environment prior to the start of the Stabilize Phase
  - Be available to work side-by-side with the Microsoft team

  f. **Deliverables**
  - Test Plan Checklist

- **Stabilization**: The Stabilization phase which is also the lab environment will involve testing of the Exchange 2007 Design in a lab environment, testing the migration plan, the coexistence between Notes and Exchange and acceptance by the customer.

  Key activities for this phase are as follows;

  g. **Key Microsoft Activities**
  - The Microsoft consultant will be following a test plan to test the migration process, the co-existence process between Notes and Exchange, the connectors, and the migration tool in the Lab environment
  - Update the Functional Design Spec
  - Update the Migration Plan
  - Update the Coexistence Plan

  h. **Key Customer Activities**
  - LA_DPSS staff will be working side by side as with the consultant as part of the informal knowledge transfer.

  i. **Deliverables**
  - Update Functional Design Spec
  - Update Migration Plan

- Update Coexistence Plan

- **Deployment**: The Deployment phase includes the deployment and implementation of the Exchange solution into the production environment.

  Key activities for this phase are as follows;

  j. **Key Microsoft Activities**

  - Configure and Setup the Exchange Servers in the production environment
  - Setup Connectors and Tools in the production environment
  - Add 30 new users from the "LEADER Group" to Exchange
  - Migrate 270 users from Lotus Notes to Exchange

  k. **Key Customer Activities**

  - Configure and Setup Server hardware and Operating Systems in the production environment
  - SAN Configuration and Setup specifically for Exchange
  - LA_DPSS staff will be working side by side with the consultant as part of the informal knowledge transfer during the migration of users and their e-mail data.
  - Production Pilot Acceptance by LA DPSS Staff

  l. **Deliverables**

  - Adding 30 new users from the "LEADER Group" to Exchange
  - Migrate 270 users from Lotus Notes to Exchange

3.2 Timeline

The Project is expected to span approximately over 19 Business Weeks (where a business week is defined as five (5) eight hour working days).

The project will be conducted in two phases; the first phase is to build the Exchange Solution and add 30 new users from the LEADER Group while the second phase will be migrating approximately 270 users from Lotus Notes to Exchange.

High level tasks that will be worked on during those weeks are as follows;

Phase 1:

- Week 1-3: Plan Phase: Project Kick off meeting, finalize requirements, design workshops , create Functional spec and co-existence documents, approve documents
- Weeks 4-6: Develop Phase: develop a test plan, User Acceptance plan, and setup and configure lab hardware.
- Weeks 7-9: Stabilize Phase: Testing co-existing, testing mail flow, calendaring, etc. update Functional Spec and co-existence documents.
- Weeks 10-12: Deploy Phase: Setup Production Hardware, Configure Servers, Setup SAN, Add 30 New Users to Exchange—LEADER Group

Phase 2:

This phase will be focusing on the remaining tasks of the project where each phase of the process will be revisited to complete specific tasks and then migrate some DPSS users from Lotus Notes to Exchange.

- Weeks 13-14: Plan Phase: Create Migration Document, review and approve document
- Weeks 15-17: Stabilizing Phase: Test user data migration, Calendaring/Meeting data migration, etc...and update Migration Document
- Weeks 17-18: Deployment Phase: setup migration machines, migration tools, and migrate 270 users from Lotus Notes to Exchange.
- Week 19: Customer feedback, documents update and sign off on deliverables

Note: a more detailed Project Schedule Plan will be developed with the specific tasks for each phase of the project during the Plan Phase of the project.

3.3 Key Service Deliverables and Acceptance Process

3.3.1 Key Project Service Deliverables

The following is a list of the key project service deliverables that will be delivered within this SOW which must be formally reviewed and accepted. At the beginning of each phase, Microsoft and Customer will jointly define in writing the Acceptance Criteria for each deliverable.

Project Phase	Service Deliverable Name	Service Deliverable Description
Design	Functional Spec	This document will contain the specifications both logical and physical needed to achieve the business and technical requirements of Exchange 2007
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
Design	Migration	This document will contain information pertaining to the logical and physical environment that will be required for the Migration contemplated in this statement of work, and information detailing the states of **Migration** through the Migration, and provides a high level step by step sequence of the Migration Process.
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
Design	Coexistence Plan	This document will contain information and requirements about running and maintaining a coexistence messaging environment during

		the migration process from Notes to Exchange.
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
(Lab) Development	Test Plan Checklist	Develop a test plan for Testing Exchange in a lab environment with the proper Hardware Configuration, and Software requirements
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
(lab) Stabilization	Update Functional Spec document	• The functional Spec document gets a an update after testing of the solution is complete
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
(lab) Stabilization	Update Migration plan	• Update the Migration plan after testing has been completed
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
(lab) Stabilization	Update Coexistence plan	• Update the Migration plan after testing has been completed
Project Phase	**Service Deliverable Name**	**Service Deliverable Description**
(Production) Deployment		• Add 30 new users to Exchange with OWA requirements • Migrate 270 users from Notes to Exchange

3.3.2 Service Deliverable Acceptance Process

Upon completion of a deliverable Microsoft will prepare a Service Deliverable Acceptance Form (see Exhibit section) and forward with the respective service deliverable to the Customer Project Manager, or Customer designee. The Customer will determine whether the service deliverable meets the deliverable Acceptance Criteria. The Customer will either accept the service deliverable (by signing and dating the Service Deliverable Acceptance Form) or will provide a single list of written reasons for rejecting it. Microsoft will then correct in-scope problems found with the service deliverable and will address out-of-scope changes according to the Change Management Process. Once Microsoft corrects all previously identified in-scope problems from the list, the service deliverable will be deemed accepted.

3.4 Project Governance Approach

The purpose of this section is to describe our proposed project management approach including communications, project issues, project change control, project acceptance and termination.

The project shall be managed jointly by Microsoft and LA-DPSS. The Customer role for Project Management shall be performed by the general Project Manager. The Microsoft Consulting Services role for Project Management shall be performed by a Microsoft Project Manager.

3.4.1 Communication Plan

Microsoft Corporation has found that open, direct, and constant communications are hallmarks of successful consulting engagements for its Customers. In that light and to that goal, Microsoft Consulting Services delivers a consistent communication methodology to keep Customers with whom it engages fully informed of the goals, status and success of an engagement.

A formal process will be employed to facilitate communication during the project. There will be two key vehicles for providing this communication: a weekly status report and a weekly status meeting.

- The Microsoft Project Manager, working in conjunction with the LA DPSS Project Manager, will compile status reports with the frequency defined above for distribution to both Customer and Microsoft management.
- Meetings will be held with the frequency defined above to review overall status, the project schedule and open issues noted in the status report.

3.4.2 Issue/Risk Management Procedure

The following general procedure will be used to manage project issues and risks:

- Identify and document
- Assess impact and prioritize
- Assign responsibility
- Monitor and report progress
- Communicate issue resolution

A mutually agreed upon issue escalation process will be defined at the outset of the project.

3.4.3 Change Control process

We will adhere to the Changes and Amendments as defined in the Los Angeles County Master Services Agreement (MSA).

3.4.4 Work Acceptance

We will adhere to the work approval and acceptance as defined in the Los Angeles County Master Services Agreement (MSA).

3.4.5 Termination

We will adhere to the termination clause as defined in the Los Angeles County Master Services Agreement (MSA).

4 PROJECT ORGANIZATION AND STAFFING

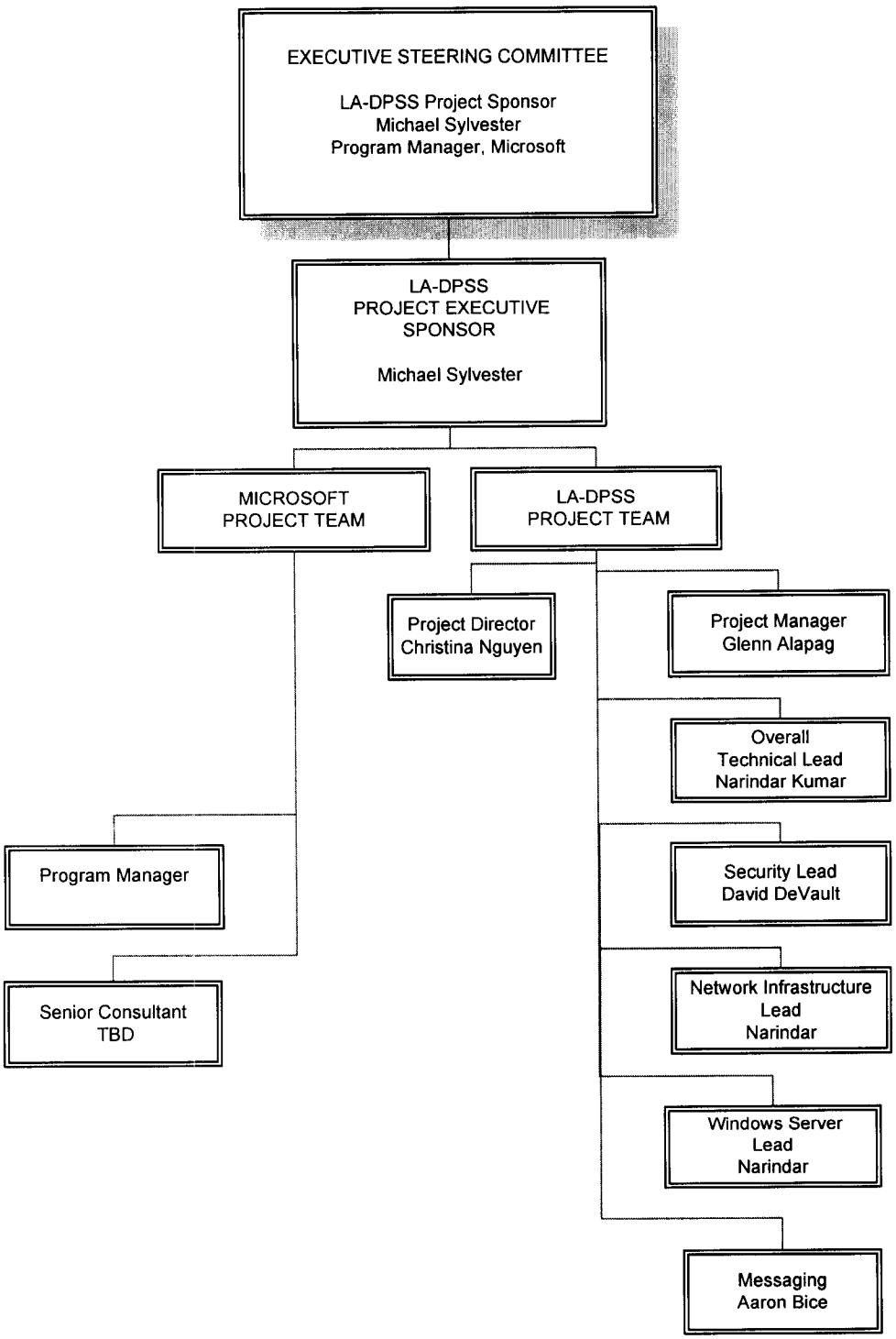
4.1 Project Organization Structure

Please see the following page for an organizational chart that depicts the Project Organization Structure including the Executive Steering Committee, the Project Sponsor, LA-DPSS and Microsoft Project Teams.

Both LA-DPSS and the Microsoft Project Team shall report to the Executive Steering Committee for final determination of issues.

The LA-DPSS Project Team shall report to their Project Manager and ultimately to their Project Sponsor

The Microsoft Project Team shall report to the Microsoft Program Manager


EXECUTIVE STEERING COMMITTEE
LA-DPSS Project Sponsor
Michael Sylvester
Program Manager, Microsoft
LA-DPSS
PROJECT EXECUTIVE
SPONSOR
Michael Sylvester
MICROSOFT
PROJECT TEAM
LA-DPSS
PROJECT TEAM
Project Director
Christina Nguyen
Project Manager
Glenn Alapag
Overall
Technical Lead
Narindar Kumar
Program Manager
Security Lead
David DeVault
Senior Consultant
TBD
Network Infrastructure
Lead
Narindar
Windows Server
Lead
Narindar
Messaging
Aaron Bice

4.2 Project Roles and Responsibilities

This section provides a brief overview of key Project roles and responsibilities

Microsoft Consulting Services Project Team

1. **Program Manager**: The role of the Program Manager will be to oversight and manage the overall delivery of the Scope of Work presented herein by the Microsoft Consulting Services Project Team

2. **Senior Consultant:** This Senior Consultant shall be involved in all activities of this project for Microsoft activities and shall provide the day-to-day project management activities. In addition, this Senior Consultant shall be the lead consultant for the activities related to the Exchange. Moreover, this consultant shall coordinate the activities of the other consultants on the Microsoft Project Team.

Customer Project Team

1. **Executive Sponsor**: The Executive Sponsor will work with the overall Project Team (Microsoft and LA-DPSS) to help initiate and facilitate the teams' execution of the tasks and processes required to perform and complete all Phases on a timely basis. The executive sponsor however will not attend every weekly meeting but can be a resource for escalation or direction.

2. **Project Manager**: The Project Manager would assist the overall Project Team with Project Management duties, and would meet as required with the overall Project Team to track the progress of the project's delivery, among other things.

3. **Overall Technical Lead**: The Technical Lead would be a senior technical individual and would assist the overall Project Team to obtain and gain access to information and would be directly involved in working with the overall Project Team to discover and prepare the various documents and plans detailed herein that form the foundations of the requirements, Risk Assessment, among other things.

4. **Security Lead:** The Security Lead role shall be a technical individual that has depth and breadth knowledge regarding customer's network and server security settings, configurations and policies. This individual would be able to make decisions regarding the customer's security requirements and infrastructure as well as provide information regarding customer's security policies and the proposed requirements for the Microsoft solution.

5. **Network Infrastructure Lead:** The Network Infrastructure Lead shall be a technical individual that has depth and breadth knowledge regarding the customer's logical and physical network infrastructure and network devices. This individual would be able to make decisions regarding network configuration, settings and requirements relative to the Microsoft solution and be able to address the network issues related to the new messaging platform

6. **Messaging Lead:** The messaging Lead shall be a technical individual that has a depth and breadth knowledge regarding customer's existing messaging environment and can provide that information and related items to the joint project teams. This individual would be able to make decisions regarding the current environment, Exchange, and the Windows Active Directory structure, and configurations.

4.3 Executive Steering Committee

Overall senior management oversight and direction for this project will be provided by an Executive Steering Committee. Steering Committee meetings will be held monthly. Customer and Microsoft Managers will share joint responsibility for reporting to the Steering Committee. The Steering Committee will consist of the key business sponsors with overall responsibility for leading this project at a strategic level. These include:

- LA-DPSS Steering Committee, Michael Sylvester, Christina Nguyen
- Waleed Nammari, Microsoft Program Manager (PgM)

The Executive Review Steering Committee is responsible for the following:

- Making decisions on project strategic direction.
- Serving as the final arbiter of Project issues.
- Approving significant Change Request Forms.

5 General Customer Responsibilities and Project Assumptions

5.1 General Customer Responsibilities

Our delivery of the services are dependent on your involvement in all aspects of the services, your ability to provide accurate and complete information as needed, your timely and effective completion of the responsibilities as identified herein, the accuracy and completeness of the Assumptions, and timely decisions and approvals by your management. In addition to any Customer activities identified in the Approach section, you will perform the tasks, furnish the personnel, provide the resources, or undertake the responsibilities specified below.

- Provide a Project Manager, a project Lead to participate in the Project. This Customer representative will:
  - Work with Microsoft consultants and to deliver the Project on schedule.
  - Manage Project plan(s), schedules, etc.
  - Make key day-to-day decisions and provide a single point of contact
  - Accept deliverables.
- Provide, as needed, personnel knowledgeable in the current Customer systems.
- Provide necessary work site access as well as necessary Customer systems log-ons and passwords.
- Provide access to other materials and resources as needed, and as advised by us in advance.
- Provide suitable work area spaces with desks, chairs, and telephones, etc.
- Provide LAN connections that enable access to the Internet and e-mail for Microsoft on-site team.
- Assume coordination responsibility for management of all non-Microsoft managed vendors.
- Provide access with proper licenses to all necessary tools and third party products required for Microsoft to complete its assigned tasks.
- The customer will be able to readily identify and provide software and licensing information for any legacy or third-party software products
- Customer decision processes will be executed in a timely fashion.
- Exchange Server Mail data availability, accuracy and cleanness will be the responsibility of the customer during the migration plan.
- Client user data migration (not Server base) will be the responsibility of the LA_DPSS staff.
- User client training will be the responsibility of the customer
- Exchange admin training above and beyond the informal knowledge transfer during the project engagement will be the responsibility of the customer.

In performing our services under this SOW and the applicable WO, we will rely upon any instructions, authorizations, approvals or other information provided to us by your project Manager or by any other personnel identified by your Project Manager.

5.2 Project Assumptions

The Services, fees and delivery schedule for this project are based upon the following assumptions.

- The project kick off date is projected to be approximately in **XXXX, 2008**
- That there are no unforeseen delays to the project that are not detailed in this statement of work.
- The project is neither dependent nor conditional upon any other projects within LA-DPSS.
- Customer personnel are available to work with Microsoft's project team as needed.
- That the standard work day for the Project is between 7:30 AM and 4:30 PM, Monday through Friday, except for Microsoft and Customer holidays
-

Los Angeles County, DPSS, Exchange 2007 Migration
Deliverables Pricing

Project Phase	Service Deliverable Name	Service Deliverable Description	Deliverable Price
Design	Functional Spec	This document will contain the specifications both logical and physical needed to achieve	$ 100,000.00
Design	Migration	This document will contain information pertaining to the logical and physical	
Design	Coexistence Plan	This document will contain information and requirements about running and maintaining a coexistence messaging environment during the migration process from Notes to Exchange.	
(Lab) Development	Test Plan Checklist	Develop a test plan for Testing Exchange in a lab environment with the proper Hardware Configuration, and Software requirements	$ 20,000.00
(lab) Stabilization	Update Functional Spec document	• The functional Spec document gets a an update after testing of the solution is complete	$ 50,000.00
(lab) Stabilization	Update Migration plan	• Update the Migration plan after testing has been completed	
(lab) Stabilization	Update Coexistence plan	• Update the Migration plan after testing has been completed	
(Production) Deployment	Migrating users to production	• Pilot of 30 users • Migrate 270 users from Notes to Exchange	$ 87,250.00
		Total	$ 257,250.00